

CASE MANAGER SPECIFIC COMPETENCIES

Competency U=Unsatisfactory N=Needs Improvement M=Meets Expectations E=Exceeds Expectations O=Outstanding	Self Evaluation	Supervisor Evaluation	Follow- up Review Needed Y or N	Date of Next Review	Improvement Activities <i>(required for all "N" and "U" marks)</i>
Case Referral and Acceptance					
1. Appropriately evaluates patient indicators (risk screening, etc)					
2. Appropriately obtains the necessary case acceptance authorizations/consents, etc.					
Case Planning and Implementation					
1. Completes competent interviews, accesses resources to gather information for factual base on which to formulate a plan.					
2. Demonstrates knowledge and understanding of patients health and social presenting risks and applies appropriate risk stratification					
3. Critically analyzes information gathered during assessment phase and applies in the formulation of a plan.					
4. Critically analyzes information gathered during the assessment phase and applied to the CM assessment summary.					
5. Conveys knowledge of health and/or social service delivery model to patients.					
6. Establishes patient goals based on appropriate resource utilization, patient consensus, and level of care and services required.					

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7. Documents accurately in established record system.					
8. Effectively communicates patient care plan with support staff					
9. Provides timely completion of all case planning and implementation activities.					
Case Monitoring and Evaluation					
1. Appropriately applies effective follow-up dates to care plan interventions.					
2. Performs routine comprehensive, independent reassessment of patient status and progress toward achievement of care plan goals.					
3. Appropriately utilizes support staff in case monitoring and evaluation					
4. Appropriately seeks Clinical Supervisory and/or Medical Director assistance.					
5. Makes adjustments in care plan as needed to meet goals					
6. Effectively utilizes existing community resources in providing care/services to meet goals.					
7. Pro-actively promotes appropriate adjustments in the care plan to enhance outcomes when situation is					

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static or regressive.					
8. Maintains accurate, up-to-date documentation in the established case management record system.					
Case Closure					
1. Demonstrates appropriate closure of cases against specified criteria.					
General					
1. Provides care within the scope of practice as defined by published standards and guidelines. Adheres to his/her professional code of ethics.					
2. Incorporates currently accepted, evidenced-based guidelines to maximize patient outcomes.					
3. Appropriately communicates changes in eligibility, when identified to appropriate department/person.					
4. Acts in accordance with laws and procedures governing confidentiality, release of information, consent, domestic violence reporting, etc.					
5. Appropriately reports to Clinical Supervisor potential or actual patient safety concerns (unsafe home environment, suicide potential, infectious disease)					
6. Applies appropriate home visit					

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safety guidelines.					
7. Provides services with respect for the autonomy, dignity, privacy and rights of the patient.					
8. Provides input toward improvements in case management services and analysis of outcome data.					
9. Demonstrates accurate and effective oral and written communication skills					
10. Demonstrates technological competency skills necessary to perform job skills (Word, Excel, and established record system).					
11. Helps create and enhance a positive work environment.					
12. Promotes a sense of teamwork within medical management department as well as the organization as a whole					
13. Promotes the most effective and efficient use of material, human and financial resources.					

U=Unsatisfactory = Immediate improvement needed to meet basic job requirements.

N=Needs Improvement = Basic job requirements usually being met, but improvement still needed.

M=Meets expectations=Basic job requirements currently being met, occasionally exceeded.

E=Exceeds expectations=Basic job requirements frequently exceeded, strives to achieve better results.

O=Outstanding=Basic job requirements are consistently exceeded by a significant margin, shows exceptional effort and ability.

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All items may be supported by improvement activities; however all “U” and “N” marks must be substantiated by improvement activities and a review date for evaluation of improvement.

Case Manager Signature and Date: _____

Supervisor Signature and Date: _____

The space below may be used for additional comments.